# Homeless Management Information System New User Training

The Homeless Management Information System (HMIS) is a computerized, web-based data collection system that tracks the nature and scope of human service needs at an individual and agency level as well as across Indiana. HMIS is specifically designed to capture uniform client level data over time to understand the characteristics and service needs of men, women, and children. The Indiana HMIS uses a software platform from Foothold Technology and can be accessed using the following URL:

https://inhmis.footholdtechnology.com/

**New User Training Outline:** This training is intended to provide a brief overview of the system and instruct users on the client admission process with an emphasis on Intake, Discharge, and recording Services. New users should expect to take some time to become familiar with the characteristics of the HMIS and to build comfort in finding the necessary fields and screens to efficiently enter client information.

- Introductions and Housekeeping
- Introduction to HMIS & IHCDA
- Website Resources
- The Opening Menu
- Client Lookup
- Intake/Admission
- Consents and Sharing
- Household/Child Info
- Chart Records and Face Sheet
- Services and Contact Logs
- Discharging Clients
- Re-Admiting and Cloning
- Help Menu and Other Resources

**New User Training Notes:** We suggest printing these notes and keeping them close when you begin to use the HMIS. They address most of the commonly experienced problems in finding or entering information in the system. Please remember to accurately log in and log out of each session with HMIS.

**What is HMIS?**

- Homeless Management Information System: A web-based database that tracks the nature and scope of human service needs for low income people in Indiana.
- Congressional Directive in 2001 – Congress wanted to get an unduplicated count of homeless persons in the United States. Funding for HMIS is subsidized by HUD and every state is responsible for implementing an HMIS system.
- In Indiana, CHIP was chosen to implement HMIS in Indianapolis and ICHHI was chosen to implement HMIS for the other 91 counties ("The Balance of State").
- In 2002 Foothold Technology's AWARDS software was selected for the Balance of State.
- In March 2008 IHCDA took over implementation of the HMIS for the Balance of State when ICHHI went out of business.
- Foothold Technology provides technical assistance and answers Help Desk messages.

**Training Overview**

- Familiarize yourself with the documents in training packet or on website.
    - Notice of Privacy Practices
    - AWARDS/HMIS FAQ
    - Client Consent Form
    - Opening Menu Newsletter
    - Intake Checklist
    - Etc.
- The Log In Page for HMIS is **https://inhmis.footholdtechnology.com/**
- Log in with your own username and password. Usernames and passwords can not be shared.
- Make sure to change your password immediately after training and every 3 months.

**The Opening Menu**

- Review of the Opening Menu
- Opening Menu is broken up into three sections: General Information (with Calendar and Messages), Chart Records (where client information is stored), and Administration (where you can change your password and find a list of reports).
- Client Lookup is the button in the center that lives by itself. It's the most important button because it allows you to see if a client is already in the system and to work with their records. If a client is found by doing a Client Lookup then you can clone their information into your own program (process explained later).
- Help menu – Button lives at the bottom of every screen. If you are having difficulty in any area of the database, clicking help menu and AWARDS online help will bring you to the exact help section for the area of the data base that you are in.
- Help Desk – A way to send secure messages to the HMIS staff letting them know there's a problem with the system, or asking for help.
- Announcements – Training Announcements, New Features.
- Agency File Cabinet – Important Documents and Contact Info.
- Foothold's Logo works as a Back Button. Avoid using the back buttons in your browser. Avoid using "Jump Back" too much; instead get in the habit of moving forward and using "Opening Menu" to come back to the main menu any time you get lost.
- IHCDA's logo works as a Print Button.

**Client Lookup**

- User Client Lookup to search for new clients before adding them to the system. You can also use Client Lookup to search for existing clients in order to access their Chart Records.
- We recommend searching for just part of a client's name and not searching by birth date or social security number because you won't always know how other agencies keyed in a client's information. Be aware that sometimes you will need to search for a name using different spellings. EG, "Bob" vs. "Robert"
- Change Search results to 100 if necessary. Usually 25 is sufficient.
- If you want to "clone a record" you will need to make a note of how their full name & social security number were keyed in, even if there's a typo. You'll need to have this information in order to copy their record at Admission.

**Intake/Admission**

- You can get to Intake/Admission from the Opening Menu or from Client Lookup.
- Always select the correct Program first.
- Use a Training Program to practice, and only enter fake information in training programs.
- You can search for one particular client, or get a list of all clients who were admitted within a date range. When searching by name, it ignores the date range completely.
- Always enter the complete First Name, Last Name, and Social Security Number. Ignore the Alias field. Always use proper names and full SS#.
- Make sure when cloning a record from another program that you type in the name and social security number exactly how it was keyed in by the other agency. Be careful not to add any spaces after the names.
- Select "Search/Create"
- For new clients click the "Create New Application" link. For existing clients click on their name and choose to Re-admit the client and create a new record.

**The Intake Form**

- Note that the "Intake Date" drop down by default only contains the last two weeks. This is because we require data entry to be done within two weeks. If you should fall behind on paperwork, please do not put in an incorrect date—instead you should call us first and we can give you the Backdating Permit which will allow you to catch up on paperwork and enter any date necessary.
- Residence Unit is the bed or apartment that the client is staying in. Note that only "vacant" units will show up on this list. If the bed you need to select does not show up that means that it is still occupied and you will need to discharge the previous client first.
- Primary Worker is the case manager or staff person assigned to that client.
- Watch for required fields, denoted by a red asterisk. You will not be able to save the form if any required fields are missing. Just because a field is not required doesn't mean that you should skip over it. Fill out intake application as thoroughly as possible – requirements change and you don't want to be missing data.
- Tabbing will move you from required field to required field or from non-required field to non-required field. If you want to fill out a non-required field you will need to use the mouse to click into the non-required field, and then use the mouse to click back into the next required field. Some agencies like tabbing past non-required fields and some do not. We can turn this option off for an agency if desired and tabbing will then go to every field.
- If you do not have a Social Security Number for a client you can enter 999-99-9999 and mark "Don't know" or "Refused" for SSN Data Quality. Collecting Social Security Numbers is very important for reducing duplicate client counts in the system.

- Race is multiple choice--select all that apply. Ethnicity is just asking if the client is Hispanic or not. Note that Ethnicity is different from race, so someone who identifies as Hispanic would also need to choose a Race category. (Typically someone of Mexican descent will identify as White; whereas someone of Haitian descent will identify as Black).
- Date Last Left Permanent Address and Zip Code of Last Permanent Address are trying to figure out where clients are coming from, and how long it's been since they were in stable housing. A permanent address is a room, house or apartment that the client lived in for at least 3 months. You may have to estimate the date.
- There is a zip code look up if the client can only give you the city and state you can use that link. The more complete your data the better your reports will be.
- Note that for HUD funded agencies skipping fields, entering all 9's, or entering fake data results in a lower score on Data Quality. Intentionally entering fake or incorrect data into the system will result in an agency audit and potential removal from the system.
- Residence Prior to Program Entry – This is asking where the client slept last night. This is usually different from their last permanent address. The one exception is for clients who were in jail for less than 30 days. For those individuals you should ignore their jail stay and mark where they slept immediately before going into prison. This is due to the rules on the HUD APR.
- Length of stay at previous residence: how long were that at the place they were last night?
- Homeless cause - many reason may apply, but choose the main factor
- Homeless status:
    - At Risk – Client is currently living in housing that they secured for themselves, or that is in their own name (mortgage or lease agreement), that they are in imminent danger of losing.
    - Homeless (HUD Defined) – (1) an individual who lacks a fixed, regular, and adequate nighttime residence; and (2) an individual who has a primary nighttime residence that is-- (A) a supervised publicly or privately operated shelter designed to provide temporary living accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill); (B) an institution that provides a temporary residence for individuals intended to be institutionalized; or (C) a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings.
    - Not Currently Homeless – Client is not presently homeless. They have their own house or apartment.
    - Precariously Housed – Client is living in housing that is not in their name, with no legal agreement dictating the terms of their stay, and they are not certain how far into the future they will be able to stay there (e.g. days or weeks).
- Episodes of homelessness: Note that this is asking how many times they have been homeless in the past 3 years. The definition most often used for residential programs is that a new episode of homelessness begins when a person returns to the shelter system after having been out of the system for at least 30 days; if the person has been out less than 30 days, readmissions are considered part of the same homeless episode. Their current episode of homelessness does count as one.
- Homeless duration: How long has the client been homeless this current time?
- Marital status – the actual marital status of the client.
- Individual/Family Type: Enter family type as how they are presenting for service. For example, if a mother of two is looking for shelter but her children stay with a grandparent and are not entering the shelter then that client would be entered as a single female.
- Number of children – This is the number of children staying with the family at this shelter or program. Do not record information on non-custodial children.

- Monthly income source: If you check off an income source a dollar amount must be entered. If there is no income, check off “none”. Remember that this is a monthly dollar amount, not hourly or annual.
- Non-cash benefits – Check all that apply or check none.
- Special Needs – Check all that apply and ask each one separately. This is required for the HUD APR, so you must ask clients each of these questions. MRDD is Mental Retardation or Development Disability.
- General Health – This is a self-reported question--how the client views their own physical health.
- Disabling condition – Any serious disability which is expected to be of long duration and will impair the client’s ability to live independently. For clients with multiple disabling conditions choose the one that is the most serious.
- When you have completed all the fields on the intake screen, hit “HOUSING ADMISSION”. In non-residential programs this button will be labeled “PROCESS ADMISSION”. Notice that this button is capitalized which is the systems way of telling you that this is probably the button you want to click next.
- If you missed a required field or entered conflicting data you will receive an error message explaining either what is missing or what the conflict is. No data has been saved until after all errors are fixed and the intake has been processed.
- If you filled out everything, you will be taken to the Client Consent Form.

**Client Consent / Sharing**

- Clients in most programs have the option of sharing their information with other programs. The benefit of sharing information for the client is that if they ever go to another agency for services, the other agency will already see all of their information and may not have to ask them the same questions. The benefit for us is that agencies will reduce the number of duplicate clients entered into the system, helping us establish a better unduplicated count of homeless and low-income clients.
- Make sure clients have access to the Notice of Privacy Practices. This notice lets them know how their information is being used. A client who agrees to answer some or all of the questions on the intake form is giving implied consent that their information may be entered into the HMIS. However, this implied consent does not allow you to share their information with other agencies until the client has signed the applicable written consent forms. This information will be shared only with other HMIS partners.
- What information will be shared? The agency they were served at, intake and discharge dates, and the client’s Intake Form and Face Sheet.
- What information will not be shared? Services received and any case management information (progress notes, service plans, etc).
- The client can “Agree to share all my info”, “Agree to share partial info” (will not show DV, HIV, or mental health) or “Do NOT agree to share any info”.
- Agencies can elect to never share any information with other agencies.
- Enter the date that the client signed the paper form. Keep the paper form on file for at least 3 years.
- The consent expires after three years. At the end of 3 years none of the client’s information is shared with other agencies.
- After you process the consent form you are taken back to the Intake Form and can review your information.

**Household/Child Information**

- Next you will be entering information about any children or other Household Members (such as spouses and grandparents).

- Select “Household/Child Info” button to enter additional family members. You will find this button at the top of the intake form after processing an admission, or from the Face Sheet.
- Pay attention to section headings: “List all ADULTS living in household” is first, then “List all children under 18 LIVING IN HOUSEHOLD” and finally “List all children under 18 NOT LIVING IN HOUSEHOLD.” The third section is optional and is for children that the client does not have custody of. The other two sections must be filled out.
- It is important to note that if you do not enter information into the Household/Child form then your clients will be counted as Single Persons on several reports including the Annual Homeless Assessment Report.
- There are 4 spaces for each section, after selecting “SAVE” you will be taken back to the intake form in data entry mode. If you have more than 4 family members in a section you can select the household/child button again and HMIS will have automatically added 2 new spaces in any section that was full.
- After you “SAVE” the Household info, you will be taken back to the intake form in data entry mode, go to the bottom of the form and select “UPDATE” form. You are now viewing the intake form in “READ ONLY” view.

**Client Chart Records**

- After reviewing the intake form go to the bottom of the form and select “CHART RECORDS”. This is the same place you will get to if you were to click on a client’s records from Client Lookup on the opening menu.
- From here you’ll have access to the Face Sheet, Service Plans, Progress Notes, Contact Logs, Entitlements, Employment, Hospitalization, and Charting Events.
- The Face Sheet is a place where you can find a summary of the client’s demographics information as well as additional information about the client. The face sheet contains:
    - Demographics Information
    - Contact Information (address, phone, and email)
    - Additional Veterans Info
    - Miscellaneous Info
    - Household/Child Info
    - Emergency Contacts
    - Professional Contacts (doctor, therapist, etc)
    - Income and Entitlements
    - Substance Abuse Info
    - Hospitalization Record
    - Legal Data
    - DSM IV Diagnosis Table
    - Allergies
    - HIV/AIDS Info
    - Medication Log
    - Client Photo and Description
    - Client File Cabinet (attach documents)
- The one part of Chart Records that is important for most users to fill out is the Contact Logs section because it is required for the HUD APR.

**Enter Services on Contact Logs**

- You can access the Contact Logs section from Chart Records, Client Lookup, or the Services Menu.
- Select “CONTACTS LOG” to find the place where you can record all material goods and services that you are providing to a client. This is a necessary step for agencies filling out the HUD Annual Progress Report.
- From here you will have the option to “ADD A NEW SESSION”, or EDIT an existing contact. The first time you enter, there will be no option for edit. Just select “CONTINUE”.

- Enter the Date you gave the client services, the contact duration (how long you spoke with them), and the Contact Time (when you gave services).
- Check off all services you have provided to the client
- You may enter the number of units, the total cost of the services, and a description ("Service Details"). These fields are optional and will default to one unit. These fields are important if you want accurate reports on services given.
- At the bottom of the form you may also enter a "Progress Note"
- Select "CONTINUE" to save the note.
- You will be taken back to the Contact log index, where you can add a new contact, edit or view the previous contact.
- To edit a note, select the note and hit Continue. You can also delete notes by choosing to edit them and then clicking on "Delete".
- To print out the note you entered simply click on the date of the note you are interested in reviewing.
- You can get a report on the services provided to clients by going to the Services menu from the Opening Menu. Select the correct program from the drop down menu (or "All Agency Programs" and change DATA ENTRY to REPORT. Then click "CONTACTS LOG" and you'll be taken to the "SERVICES DELIVERY REPORT". You can now choose the parameters for your report by selecting a particular client or all clients, a date range for the report, and how you want to group the report: Consumer, Date, or Service.

**Discharging Clients**

- It is important to always discharge clients on a timely basis. In residential programs you should discharge clients as soon as they move out. Failure to discharge a client will result in their bed remaining occupied.
- In non-residential programs you should discharge clients as soon as you are done working with them (often this is the same date). Forgetting to discharge clients will result in inaccurate reports and large rosters of active clients. We require that all programs discharge clients who have not been seen for 14 days. Clients can always be readmitted if they come back again.
- From the Opening Menu click "Discharge"
- Select your program and click "Process Discharge".
- Leave it on "Current Program Roster" and press "Continue" to discharge a current guest. Choosing the second option will allow you to edit old discharge records.
- Select the client and hit "Continue". If you have a question asking "New Housing Placement" it is important to always select "Discharge from AWARDS Agency Housing". You should never discharge from one program into another because none of the information copies over.
- On the discharge page pay attention to all required fields.
- Enter the Discharge Date (the date the client last resided at the shelter, or the date you last worked with the client in non-residential programs). Note that the default date range is 14 days because we require all data entry to happen within 2 weeks. If you fall behind on data entry and need the backdating permit please call us.
- Income and Benefits are copied from intake. It's important to update this information otherwise it will look like none of your clients made any progress during the duration of your program.
- The "Discharge Notes" sections are optional Progress Notes that you can leave about your client.
- Hit "Apply" to process the discharge.

**Other Sections**

- Housing Menu – The housing menu contains many useful reports, and is also where you can go to change someone's resident unit (a "bed swap"). To do a bed swap select your program, select data entry, and hit continue.
- Profile Menu - Several useful reports are found here including the Program Profile Report and the Demographics Report. Look for instructions on our website.
- Help Menu – The help contains on online manual, training documents, and a link to the Help Desk. Any time there is a problem with the system, please use the Help Desk button to report the error. Look for our response in the Message module.
- The Message Module – A secure 128-bit encrypted internal email system that allows you to send and receive messages from other HMIS users. Our staff often sends out announcements and information through the HMIS messaging system. If you have a new message waiting for you, there will be a button at the bottom of the Opening Menu telling you that there is a new message waiting.
- Logout - Whenever you're done working in HMIS or stepping away from your computer always remember to use the "Logout" button at the bottom.
- If you have any questions please contact any of the HMIS staff. Our contact information is found in the Agency File Cabinet and on our website.